Distr.
LIMITED

UNIDO/PC.148
29 July 1986

UNITED NATIONS
INDUSTRIAL DEVELOPMENT ORGANIZATION

ENGLISH
Original: SPANISH

Regional Meeting for Latin America and the Caribbean in preparation of the First Consultation on the Fisheries Industry

Lima (Peru), 27-30 May 1986

REPORT*

* This document has not been formally edited by the UNIDO Secretariat.

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PREFACE

The System of Consultations

The Second General Conference of the United Nations Industrial Development Organization (UNIDO), held at Lima (Peru) in March 1975, recommended that UNIDO should include in its activities a system of continuous consultations between developed and developing countries with the aim of increasing the participation of the latter in world industrial production by means of enhanced international co-operation. Subsequently, the United Nations General Assembly, at its seventh special session in September 1975, supported this recommendation.

In May 1980 the Industrial Development Board decided to establish the System of Consultations on a permanent basis, and in May 1982 approved the rules thereof (The System of Consultations, PI/84), stipulating its principles, objectives and characteristics - in particular:

> "The System of Consultations shall be an instrument through which the United Nations Industrial Development Organization (UNIDO) is to serve as a forum for developed and developing countries in their contacts and consultations directed towards the industrialization of developing countries.
>
> The System of Consultations shall seek action-oriented measures towards increasing the share of developing countries in world industrial production and creating new industrial facilities in developing countries contributing to the establishment of a New International Economic Order. To that end, the problems associated with the industrialization of developing countries shall be considered on a continuing basis from a policy, economic, financial, social and technical point of view.
>
> The System of Consultations shall relate to co-operation between developed and developing countries and among developing countries themselves.
>
> The System of Consultations would also permit negotiations among interested parties at their request, at the same time as or after consultations.
>
> Participants of each member country should include officials of governments as well as representatives of industry, labour, consumer groups and others, as deemed appropriate by each Government.
>
> Each Consultation Meeting shall formulate a report, which shall include conclusions and recommendations agreed upon by consensus and also other significant views expressed during the discussions."

Consultations on the Fisheries Industry

At its nineteenth session in May 1985, the Industrial Development Board decided to include the First Consultation on the Fisheries Industry in the programme of consultation meetings for the biennium 1986-1987.

In accordance with this decision and the programme of work adopted, the First Consultation on the Fisheries Industry will be held in June 1987. The UNIDO Secretariat will convene a Global Preparatory Meeting to identify the priority points to be submitted to the First Consultation on the Fisheries Industry for its consideration.

In anticipation of the Global Preparatory Meeting, preparatory activities have begun at regional level, including:

- Preparation of documents on the fisheries industry in Africa, Asia and Latin America;

- Regional preparatory meetings for Africa, Asia and Latin America.

The Regional Meeting for Latin America and the Caribbean was organized by UNIDO in close collaboration with the United Nations Food and Agriculture Organization (FAO) and the Latin American Fisheries Development Organization (OLDEPESCA), under the auspices of the Peruvian Ministry of Fisheries. The meeting was held in Lima (Peru) on 27-30 May 1986.

The objectives of the meeting were:

(a) To examine the current situation of the fisheries industry in the region, and its possibilities of expansion within the Exclusive Economic Zone, established under the Convention on the Law of the Sea (1982);

(b) To identify the joint and individual constraints hindering the development of this industry in the developing countries in the region;

(c) To examine and propose forms of co-operation and international measures necessary to overcome the constraints identified;

(d) To select specific subjects for further study at the Global Preparatory Meeting and for possible inclusion among the subjects to be submitted to the First Consultation on the Fisheries Industry.

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CONCLUSIONS AND RECOMMENDATIONS

1. The Meeting arrived at the following conclusions regarding the problems facing the fisheries industry:

(a) As regards resources:

- Insufficient and inadequate knowledge of maritime and inland waterway fisheries resources;
- Even though the Region possesses a research infrastructure and scientific capability, research projects appear to be affected by inadequate distribution;
- Research into resources is conducted at national level for the most part without adequate planning;
- Insufficient regional co-ordination of fisheries research efforts.

(b) As regards the fleet:

- Fishing in the region is carried out by an industrial fleet which is suffering from obsolescence in terms of the age of the vessels and their technology, with some exceptions, and an independent operator fleet which has no technological development, a short range, inadequate use of navigation and fishing equipment and a low operational capacity;
- The position as regards facilities to maintain and repair the fleet is very uneven - varying from complete absence of facilities to a full range of installations;
- The presence of fishing fleets from outside the continent in regional waters is not always in the interests of the riparian countries.

(c) As regards fishing equipment:

- The majority of the regional fleet is inadequately equipped for navigation and fishing;
- The region is therefore in a position of strong technological dependence as far as this type of equipment is concerned.

(d) As regards fishing technology:

- Deficiencies in the on-board techniques for handling catches intended for direct human consumption.

(e) As regards harbour infrastructures:

- The region suffers from deficiencies in harbour infrastructures and services.

(f) As regards fishermen:

- Insufficient training at all levels;
- Lack of organization among independent fishermen which restricts their economic and social development.

(g) As regards processing:

- The bulk of the region's catch is intended for indirect human consumption;
- There is excessive production capacity in the fish-meal, canning and freezing industry, except in certain countries;
- The canning industry is suffering from inefficiency and a lack of diversification;
- Low level of development of other forms of processing, e.g. dried/salted, smoked, cured and other craft processes;
- Deficiencies in process and quality control;
- Inadequate development of packaging standards for fish products;
- The cost structure of the canning industry is strongly influenced by the cost of the containers.

(h) As regards human resources:

- Low level of training and classification of manpower at all levels.

(i) As regards aquaculture:

- Development is beginning, but research and production are limited, except for species of high commercial value.

(j) As regards foreign trade:

- The region's fisheries exports are dependent on the requirements of the international market;
- With some exceptions, the region does not possess adequate market information systems;
- The exporters of the region compete on international markets in isolation, which diminishes their negotiating strength. Nationally there are also difficulties in co-ordinating the supply of products for export;
- The region's exportable surplus is not sufficiently diversified;
- The deficiencies in the quality of Latin American export products mean not only that they are rejected, but also that the entire export trade is discredited;
- There are transport deficiencies which limit product distribution;
- The existence of protectionist tariff barriers restricts access by our products to important incernational markets;
- Insufficient development of intra-regional trade.

(k) As regards the supply of the internal market:

- The existence of inadequate distribution and marketing systems and the absence of fish-consumption habits mean that, notwithstanding its rich potential, fishing is not making an adequate contribution to the region's food supplies.

(l) As regards institutional aspects:

- In most of the countries State participation in fisheries administration takes place through various institutions with a poor mutual co-ordination;

- There is incompatibility betweeen the priority accorded in overall plans to the development of fishing and the resources allocated for this purpose;

- In most countries of the region, the legal provisions governing fishing are out of date.

(m) As regards co-operation:

- Even when considerable efforts are made, the regional and international co-operation processes are still inadequate, because of the lack of financial resources.

The problems affecting the fisheries sector are made even more acute by the critical financial situation in Latin America, which has a negative influence on the economic, social and technological development of the region.

2. In order to determine the priority areas, the following conclusions and recommendations were adopted:

Fishing is an economic activity which involves ancillary productive processes, as regards both the catch and the processing and marketing of fish products. This activity is sustained by the fish resources, human resources and production infrastructure, made up of the fleet, catch landing centres, storage, conservation, processing and means of distribution. In addition to this, factors accompanying the development of fishing are regarded as including, essentially, research into fish resources, training of the human resources involved in all stages of the production process, application of technologies appropriate to the characteristics and requirements of the region, and proper channelling of multilateral and bilateral international co-operation.

Consequently, the aspects connected with the development of fishing in the region should be treated as an overall entity in order to bring about rationalization of the production process. This overall approach does, none the less, allow for some specific references to relevant features which merit priority attention. The manner in which the problems affecting fishing were reviewed and characterized during the meeting thus made it possible to put forward the following areas of particular importance for regional fisheries:

(a) Fisheries research:

- Monitoring of resources to provide an ongoing evaluation.

(b) Fishing fleet:

- Definition of vessels suitable for each type of fishing;

- Study of the possibility of replacing petrol engines by diesel;

- Selection of equipment and design of fishing gear most suitable for each type of fishing.

(c) Harbour infrastructure:

- Improvement of catch landing and fish collection centres.

(d) Processing:

- Development of containers and packaging;
- Design and adaptation of equipment and machinery for the fisheries industry;
- Development of products and presentations suitable for the internal and external markets;
- Awareness and application of appropriate technology;
- Organization and rationalization of production and improvement of productivity;
- Quality control and standardization of the production processes.

(e) Marketing:

- Development of domestic and export markets;
- Improvement of marketing channels and marketing systems;
- Promotion of domestic consumption.

RECOMMENDATIONS

3. The Regional Meeting on the Fisheries Industry in Latin America and the Caribbean confirmed the existence of serious difficulties holding back the development of fisheries in general. The meeting also made it possible to characterize these difficulties by identifying a series of important subjects in the fields of fisheries research, fleet, infrastructure, processing and marketing which merit particular attention.

4. Of the subjects mentioned above, those considered as priority items to be examined at the Global Consultation on the Fisheries Industry which UNIDO will convene at Gdansk (Poland) in 1987 are the fishing fleet and product processing, as indicated in points (b) and (d) above, for which specific regional and international co-operation is deemed necessary.

5. Another subject which deserves particular treatment by international bodies, such as FAO, UNCTAD and other co-operation agencies is marketing as indicated in point (e).

6. A supplementary aspect which has aroused particular interest is the "Design, Construction and Repair of Small and Medium Vessels" project for which, through the facilities set up by OLDEPESCA, the co-operation of UNIDO is required in respect of the recommendations issued on this subject by the UNIDO meeting held at Havana (Cuba) in 1982.

I. ORGANIZATION OF THE MEETING

7. The Regional Meeting for Latin America and the Caribbean in preparation of the First Consultation on the Fisheries Industry was held in Lima (Peru) on 27-30 May 1986. The meeting was attended by 14 participants from 11 countries in the region, two observers from developed countries and representatives of the Inter-American Development Bank, OLDEPESCA, FAO and UNIDO (the list of participants is given in annex I).

Opening of the Meeting

8. At the opening session, the meeting was addressed by the Peruvian Minister of Fisheries, Mr. José Palomino Roedel, who welcomed the participants and highlighted the importance, at the present time, of the harmonious and independent development of fisheries in Latin America.

9. He pointed out that fishing had not contributed significantly to the people's food supply. He also indicated the failure to make the necessary effort to investigate resources, which had given rise to an inadequate conservation policy.

10. The Minister also referred to the currently diminished production of the region's fishing fleet within the 200 nautical mile zone, the neglected state of inland waterways and the inadequate attention to traditional techniques for fish processing, together with the lack of progress in modern methods of developing mariculture. Finally, the Minister emphasized the need to support and strengthen OLDEPESCA as a means of promoting fisheries development through regional co-operation.

11. The opening session was also addressed by Mr. Domingo Siazon, Director-General of UNIDO, who stressed the work that his Organization was doing within the framework of the System of Consultations as a means of encouraging contacts between industrialized countries and developing countries in order to promote the growth of the latter.

12. He also referred to the importance of the fisheries sector for many developing countries, in terms of its contribution to the gross domestic product and to employment, particularly in the case of independent operator fishing. He also stressed the role of the fisheries industry in combating malnutrition.

13. Finally, he expressed his confidence that the meeting would make it possible to determine those areas which were crucial for the future development of the sector and provided the incentive to formuate concrete and practical recommendations to promote international co-operation in the fisheries industry.

14. In his statement at the opening session, Dr. Juan José Cárdenas Ronco, Executive Director of OLDEPESCA, expressed the view that the meeting was indicative of the high degree of interest that the international community was showing in the development of the fisheries industry.

15. He referred to the acute nutrition and unemployment problems afflicting the region and pointed out how the development of fisheries could help to solve them, which was the reason why the Governments of Latin America and the Caribbean had decided to establish OLDEPESCA as an agency to promote such development. He likewise emphasized the need for greater efforts to improve the infrastructure, expand the fishing fleet, develop low-cost products and encourage the development of aquaculture.

II. SUMMARY OF DISCUSSIONS

16. Dr. Nelson Cárdenas Ojeda, the Peruvian Deputy Minister of Fisheries, was unanimously elected Chairman of the meeting. He presented the agenda, indicating that in order to fulfil the objectives of the meeting attention should first be given to reviewing and characterizing the problems of the fisheries industry in Latin America and the Caribbean, before proceeding to determine the priority areas for consideration by the Global Consultation. The agenda was adopted as set forth in annex II.

17. A UNIDO official took the floor to explain the scope of the meeting, indicating that it was exclusively a meeting of experts in their personal capacity and that consequently their opinions would be binding neither on their agencies nor their Governments.

18. In accordance with the Agenda, the Chairman requested Mr. Oscar do Porto, a UNIDO consultant, to present the document on regional fisheries which he had prepared on behalf of his organization.

19. The document, circulated to the participants, had been prepared on the basis of data from Argentina, Columbia, Chile, Peru and the Dominican Republic. The conclusions of the document related, primarily, to the legal aspects of those countries' activities before the establishment of the 200-mile Exclusive Economic Zone, regulations governing fishing in each country and institutional structure, level of utilization of resources, infrastructure for handling and processing, technology, marketing system and problems connected with industrial development.

20. A UNIDO official then presented the document prepared by the UNIDO Secretariat, entitled "Factors in the Analysis of Constraints on the Development of the Fisheries Industry in Latin America and the Caribbean", and setting out to explain the present status of the fisheries industry in the region and its prospects in the context of the United Nations Convention on the Law of the Sea (1982), emphasizing the limitations affecting the development of the sector and the alternatives for an overall policy to develop fishing.

21. Dr. Juan José Cárdenas, Executive Director of OLDEPESCA, introduced the "Report on the Fisheries Situation in the Region" which had been submitted to the II Conference of Ministers of OLDEPESCA in November 1985. The report began with a general appraisal of the region's economy at the end of 1984 and the food situation in Latin America and the Caribbean, went on to mention the most relevant aspects of fisheries in the region, with an analysis of the principal fisheries and a quantitative study of the main variables in the fisheries production process, and ended with conclusions on how to deal with the problems of fishing in general and recommendations designed to cope with these problems through better utilization of fisheries resources.

22. Continuing with the Agenda, the Chairman invited the participants to submit the reports relating to their countries. Each of the experts in turn summarized the fisheries situation in his country with reference to resources, catches, fleets, processing, technological development, aquaculture, marketing, institutional features and regional and international co-operation. In each case there was a lively exchange of views which enhanced the value of the discussion.

23. In the light of the working procedure adopted, the Chairman called on the participants to consider the subjects on which the meeting's attention should be focused.

24. In accordance with the procedures established, two Working Parties were set up to fulfil the purposes of the meeting.

25. Working Party No. 1 examined the problems of the region's fisheries industry and was made up of Mr. L. Verderau (Chile), Mr. L. Arias (Nicaragua), Mr. M. Dueñas (Peru), Mr. R. Miranda (Peru), Mr. G. Gutierrez (Dominican Republic), Mr. E. Bertullo (Uruguay) and Mr. F. Herrera-Terán (Venezuela). The Working Party received the support and advice of OLDEPESCA and UNIDO officials.

26. Working Party No. 2 set out to determine the priority areas and was made up of Mr. O. do Porto (Argentina), Mr. R. Jones (Barbados), Mr. J. Diaz (Cuba), Mr. L. Torres (Ecuador), Mr. A. López Cruz (Mexico) and Mr. J. Vértiz (Peru). The Working Party received the support and advice of FAO, OLDEPESCA and UNIDO officials.

27. At the end of its deliberations each Working Party submitted a report to the plenary session. The Co-ordinator of each Working Party submitted the report: Working Party No. 1 - Mr. Enrique Bertullo, Working Party No. 2 - Mr. Jorge Vértiz.

28. The Chairman submitted the conclusions and recommendations to the meeting; they gave rise to a wide-ranging discussion before being approved as included in this report, with an acknowledgement of the great efforts made by the members of both Working Parties.

29. Following the characterization of the problems affecting the region's fisheries and the identification of priority areas, the participants agreed on the important role of regional and international co-operation in fisheries development. The Director in charge of the UNIDO System of Consultations indicated the advisability for regional co-operation agencies, such as OLDEPESCA, to take part in the preparatory meeting for Africa, to be held in Dakar, in order to pass on their experience and knowledge to other regions. He also indicated that that meeting would be open to participants representing other agencies and, in general, to all countries of Latin America and the Caribbean.

30. On the same subject, Mr. Alonso López Cruz thought it advisable for OLDEPESCA to take up the co-operation work which had been done in the past by the West African Economic Community.

III. CLOSURE OF THE MEETING

31. When all the items on the agenda had been discussed, the Chairman closed the meeting, reiterating his appreciation of the hard work done by the sponsoring agencies and the participating experts in the fulfilment of its objectives. On behalf of UNIDO, the Director in charge of the UNIDO System of Consultations thanked the experts for their enthusiastic and fruitful participation.

Annex I

LIST OF PARTICIPANTS

Argentina

Oscar do Porto, consultant, Corrientes 2307 - 3° B, 7600 Mar del Plata.

Barbados

Ralph Jones, Chief Fisheries Officer, Fisheries Division, Ministry of Agriculture and Natural Resources, Bay Street, Bridgetown.

Chile

Luis Verderau P., Adviser, Under-Secretary's Office for Fisheries, Teatinos 120-11° piso, Santiago, Casilla 2803.

Cuba

Jorge Diaz A., Expert, Directorate of International Relations, Ministry of the Fisheries Industry, Ensenada de Potes y Ataré Luyano, Havana.

Dominican Republic

Gerardo Gutierrez, Chief of the Division of Bio-aquatic Resources, Dominican Institute of Industrial Technology (INDOTEC), José A. Soler, esquina Nuñez de Cáceres, Santo Domingo, Apartado Postal 329-2.

Ecuador

Luis Torres N., Chief of Technical Advisory Service, Under-Secretary's Office for Fisheries Resources, Ministry of Industry, V. M. Rendón 1006 -3er. piso, Guayaquil.

Mexico

Alonso Lopez C., Director General of International Fisheries Affairs, Ministry of Fisheries, Av. Alvaro Obregón 269, Mexico City, CP 06700.

Nicaragua

Luis Omar Arias, Director of Planning, Nicaraguan Fisheries Institute (INP), Km. 4, Carretera Sur, Managua.

Peru

Nelson Cardenas O., Deputy Minister, Ministry of Fisheries, Av. Paseo de la República 3103, Lima 27.

Isaac Dueñas, Director General of the Budget and Planning Office, Ministry of Fisheries, Av. Paseo de la República 3103 - 701, Lima 27.

Manuel Rossi B., Ministerial Adviser, Ministry of Fisheries, Av. Paseo de la República 3103, Lima 27.

Jorge Vértiz C., Adviser, Empresa Peruana de Servicios Pesqueros SA, Calle Las Tunas s/n - Edificio Los Recaudadores, Salamanca, Lima.

Uruguay

Enrique Bertullo, Director, Institute of Fisheries Research (IIP), Universidad de la República, 1160 Tomás Basañes, Montevideo.

Venezuela

Francisco Herrera-Terán, Director, National Directorate of Production and Control, Directorate General of Fisheries, Ministry of Agriculture and Stockbreeding, Parque Central - Torre Este - piso 10, Caracas.

United Nations agencies

United Nations Food and Agriculture Organization (FAO)

Héctor Lupin, Fisheries Industry Section (FII), Via delle Terme di Caracalla, 00100 Rome, Italy.

Intergovernmental organizations

Latin American Fisheries Development Organization (OLDEPESCA)

Juan José Cárdenas, Executive Director, Av. Aviación 2555-A, PO Box 10168, San Borja, Lima.

Alba Bustamante, Technical Co-ordinator, Executive Director's Office, Av. Aviación 2555-A, PO Box 10168, San Borja, Lima.

Angel Rivera, Technical Assistant, Executive Director's Office, Av. Aviación 2555-A, PO Box 10168, San Borja, Lima.

Inter-American Development Bank (IDB)

Carlos G. Menafra, Sectoral Expert, Paseo de la República 3245, Lima 27, Peru.

Observers

Canada

Attila Stersky, Fisheries Sector, Canadian International Development Agency, 200 Promenade du Portage, Hull, Quebec, Canada K1A0Q4.

France

J. Grandjeat, Commerce/Agriculture Section, French Embassy, Nicolás de Piérola 757, Lima 1, Peru.

Annex II

AGENDA

1. Opening of the meeting.

2. Approval of the agenda and organization of work.

3. Situation of the fisheries industry in Latin America:

   i. Presentation of the document on regional fisheries prepared by the UNIDO Consultant.

   ii. Presentation of the document prepared by the UNIDO Secretariat.

   iii. Presentation of the document prepared by OLDEPESCA.

   iv. Presentation of the participants' reports.

4. Discussion of the principal areas:

   i. Fisheries resources: potential - permissible catches - evaluation problems.

   ii. Catches: fishing fleet - harbour infrastructure - fishing equipment - fisheries technology - fishermen.

   iii. Processing: fish products (traditional and not traditional) - installed capacity - processing technology - manpower.

   iv. Aquaculture: aquaculture for export - aquaculture for domestic supplies.

   v. Foreign trade: products - volumes - prices - markets - quality - transport - tariff questions.

   vi. Domestic supplies: distribution infrastructure - marketing systems - prices - volumes - products.

   vii. Institutional aspects: State participation - private sector participation - industrial fishing and independent operator fishing - fisheries legislation.

   viii Regional co-operation and integration: horizontal co-operation - principal agencies operating in the region and their activities - OLDEPESCA.

5. Discussion and approval of the Final Report of the Consultation.

Annex III

LIST OF DOCUMENTS

Regional report on the fisheries industry in Latin America, by Oscar do Porto	UNIDO/PC.135
Factors in the analysis of constraints on the development of the fisheries industry in Latin America and the Caribbean	UNIDO/PC.138
Report on the fisheries situation in the region (OLDEPESCA)	---
The status of Barbados fisheries, by Ralph Jones	
Report on the fisheries industry in Chile, by Luis Verderau P.	
The fishing industry in Cuba, by Jorge Diaz A.	
The fishing industry in Ecuador, by Luis Torres Navarrete	
The Mexican fishing industry, by Alonso López Cruz	
The fisheries sector in Nicaragua, by the Nicaraguan Fisheries Institute (INPESCA)	
The fishing industry in Peru, by Benito Rossi Barrios	
Current state of the fisheries industry and development possibilities in the Dominican Republic, by Gerardo William Gutierrez and Zoila Gonzalez	
The situation of the Uruguayan fisheries industry, by E. Bertullo	
Report on the situation of the fisheries industry in Venezuela, by the National Directorate of Fisheries Production and Control, Venezuela	